How to Create a Requisition in Workday for CEMAS Services
Notes:

• This process is required ONLY for users with internal (OSU) funding

• A requisition is not tied to a specific reservation, service request, or date range. We encourage users to submit a blanket requisition that can cover a larger period of time. Simply submit a requisition that has an amount large enough that it could cover month(s) of usage

• Check out the Chartfield to Worktag Conversion Tool for help determining which account numbers ("worktags") to use
Overview
Create a Non-Catalog Requisition in Workday:

1. Log into Workday and select “Request Travel or Purchase”
2. Choose “Request to procure goods and/or services”
3. Choose “Non-Catalog Request” for requisition type
4. Consult with your Principal Investigator or business unit to verify worktags are correct and click “okay”
5. Choose “Request Non-Catalog Items” and select “Request Service”
6. Complete Service Request details
7. Choose your Spend Category: USE “SC99999”
8. Choose “CEMAS – Center for Electron Microscopy and Analysis” as the Supplier
9. Click “Add to Cart”
10. Select Shopping Cart icon and review the Checkout page. Update it as needed.
11. State the business purpose of the work in the “Internal memo” field
12. Click “Submit” to complete

Workday requisition will be submitted for approval. It must be listed as “Completed” before it can be added to FOM

Add Requisition Number in FOM:

1. Take the requisition number above and to go “My Accounts”
2. Put in requisition into the “Workday Requisition Number”; the description name doesn’t matter
3. Click “add this account” and you should receive success message if it was added. If you receive an error message, check that the requisition was approved in Workday and try again.
Step-by-Step Guide
Create a Non-Catalog Requisition:

**Note:** Non-catalog requisitions are a way to request goods or services not found in Buckeye Buy (formerly eStores)

1. **Request Travel or Purchase** > **“Request to procure goods and/or services”**

**OR**

Search for and select the **“Create Requisition”** task from the search bar
2. Confirm the information on the **Create Requisition** page:

![Create Requisition](image)

A) Confirm **Deliver-To** and **Ship-To** fields to ensure requisition is sent to the correct destination
2. Confirm the information on the **Create Requisition** page:

B) Add a Requisition Type to your request

For CEMAS services, select **“Non-Catalog Request”**
2. Confirm the information on the **Create Requisition** page:

C) The Cost Center in this instance is **who will be paying for these services**

- Funding Information will logically populate – review and select appropriate “worktags” (account numbers)
- Consult with your PI or business unit if you are unsure which “worktags” to use
- Click “OK” when finished
3. For CEMAS services, **select “Request Non-Catalog Items”**

**Select an Option**

- Request Non-Catalog Items
  
  If you can't find what you are looking for in Buckeye Buy, then you need to submit a non-catalog request for your goods or services.

Connect to Supplier Website

Buckeye Buy is the online store that hosts preferred and contracted supplier catalogs.

4. For Non-Catalog Request Type, **select “Request Service”**

**Non-Catalog Request Type**

- [ ] Request Goods
- [x] Request Service
A) Fill in a *description of the project* in your own words
  - Spell out acronyms

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**Service Request Details**

- **Description**: EXAMPLE: Instrument fees for Air Force Research Lab materials characterization project.
- **Commodity Code**
- **Spend Category**: CEMAS – Center for E1
- **Supplier**: CEMAS – Center for E1
- **Supplier Contract**: (empty)
- **Start Date**: 01/01/2021
- **End Date**: 06/30/2021
- **Extended Amount**: 2,000.00
- **Memo**: Add additional details if needed.
B) Fill in the **Spend Category**:

- **For CEMAS Services, use “SC99999”**
C) Fill in the **Supplier** – Required for FOM Requisitions

- Select **“CEMAS – Center for Electron Microscopy and Analysis”**
D) Enter a **Start Date** and **End Date**

- **We encourage users to submit a blanket requisition to cover a larger time period**

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<tr>
<th>Service Request Details</th>
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E) Enter *Extended Amount* – amount approved for CEMAS services

- Submit a requisition with an amount large enough that it could cover month(s) of usage
5. Select Shopping Cart icon and review the **Checkout** page and update as needed.

6. Review the **Requisition Information** section:

- **Internal Memo**: state the business purpose of the work.
7. Scroll right to review the **Goods** and **Services** lines and change worktags as needed.

8. Add **Attachments** if needed (approvals, additional information, etc.)

Click “Submit” to complete!
Next Steps
Add Funding Information in FOM

1. Once you create a Requisition and it is approved in Workday, take the Requisition number (example: RQ-100000070) and log into FOM
2. Go to “My Accounts”
3. Add requisition into the “Workday Requisition Number”; the description name doesn’t matter
4. Click “Add this account”
5. You should receive a success message if it was added. If you get an error, it is likely due to the requisition not being fully approved – check in workday for the status
Questions?

Contact cemasadmin@osu.edu